A1630-5

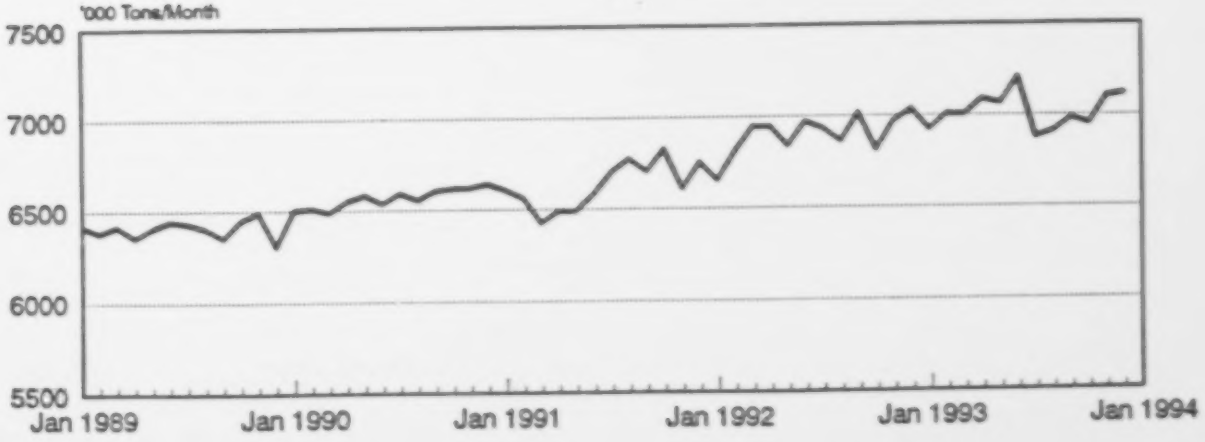
# Paper, Paperboard & Wood Pulp

**Monthly Statistical Summary - Vol. 72 No. 1** **January 1994**

**Highlights:**

- Paper production rose 1.5% in 1993, paced by a strong 3.9% increase in tissue paper output and a 2.0% gain in printing-writing paper shipments. Newsprint production stagnated last year while the packaging paper category contracted.
- Paperboard production increased 2.0% last year, with boxboard providing most of the impetus. Although domestic end-use markets for containerboard expanded briskly in 1993, inventory drawdowns and weak export demand limited the sector's production gain to 0.8%. However, export-related linerboard production ended the year on a positive note by rising steadily during the final three months of 1993.
- New supply of paper and paperboard (domestic production plus imports less exports) rose an estimated 3.3% in 1993, versus a 1.7% increase in production. Approximately half of the new supply growth was met by net imports, a development that reflected cyclically weak overseas market conditions in conjunction with currency realignments.
- Shipments of chemical paper grade market pulp edged up .9% last year as a large increase in shipments to the domestic market offset weak exports.

TOTAL PAPER & PAPERBOARD PRODUCTION
seasonally adjusted

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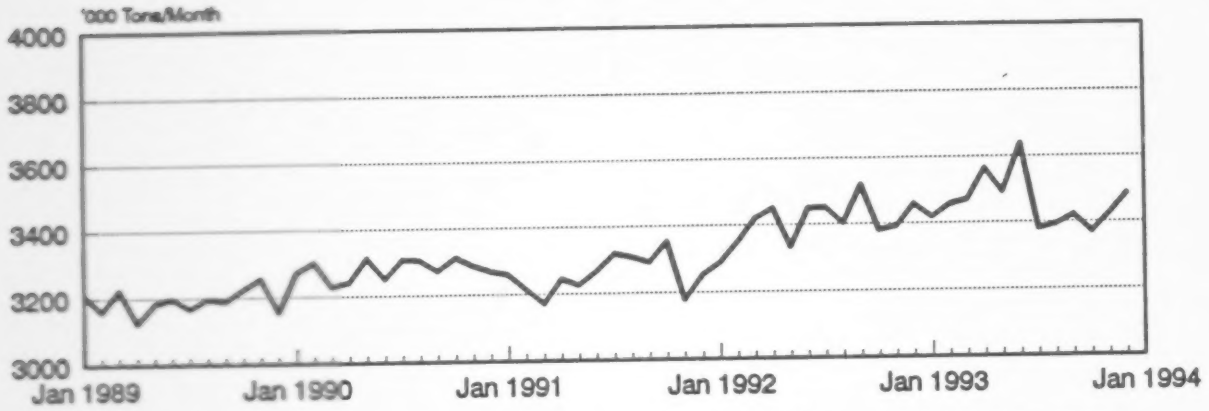
Paper: Despite an upturn in the final two months of 1993, seasonally-adjusted paper production had not yet regained the peak levels obtained during the second quarter. This pattern largely reflected lower output of newsprint and printing-writing papers relative to their respective spring levels.

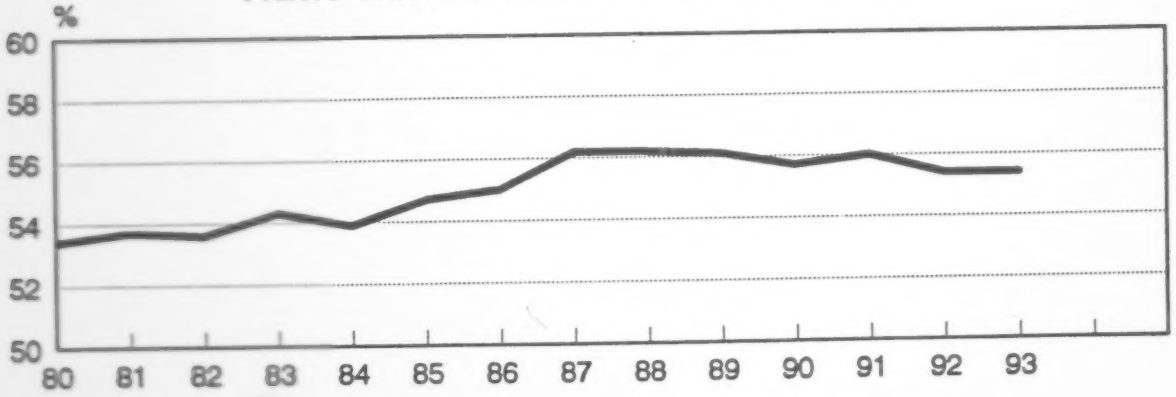
PAPER PRODUCTION
seasonally adjusted




Shipments of the four major printing-writing paper grades increased 1.8% in 1993, while new supply (shipments plus imports less exports) expanded 5.1%, with much of that growth attributable to import gains. Grade-specific increases in new supply ranged from 13.3% for uncoated groundwood and 5.7% for coated free sheet to 3.7% and 3.1% for coated groundwood and uncoated free sheet, respectively.

The firming of white collar employment and an improved advertising environment underlied last year's strong growth in new printing-writing paper supply. Current dollar advertising expenditures rose 5.2% in 1993 after climbing 3.9% in 1992, according to McCann-Erickson. As is shown by the following graph, prints' share of advertising expenditures has held approximately stable at about 55% since the mid-1980's, as rapid growth in direct mail advertising helped to offset declines in newspapers' share of total advertising revenues.

PRINTS' SHARE OF ADVERTISING EXPENDITURES

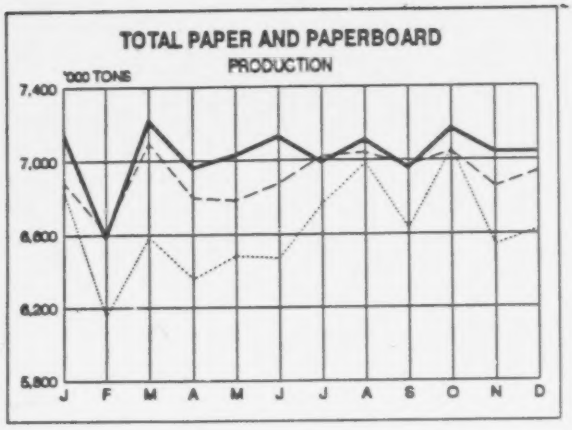


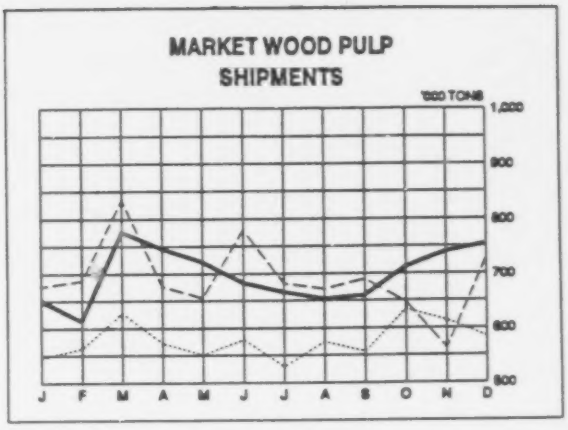

Source: McCann-Erickson/AF&PA Economics Department

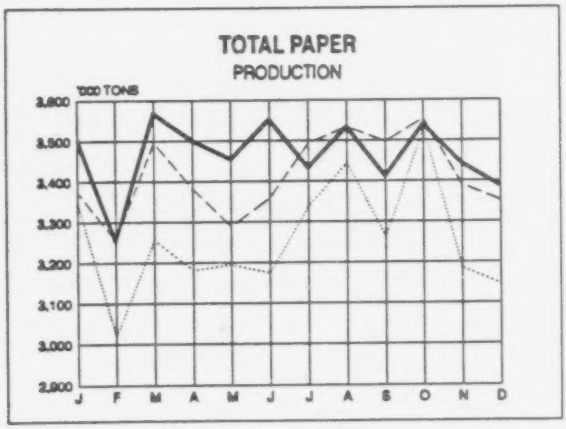
| PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons) | YEAR 1991 | YEAR 1992 | SEP 1993 | OCT 1993 | NOV (R) 1993 | DEC (P) 1993 | Annual Rate Y-T-D 1993 | % Change From Same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| PAPER | | | | | | | | |
| Newsprint – Production | 6,841 | 7,082 | 572 | 609 | 594 | 577 | 7,076 | -0.1 |
| – Shipments | 6,784 | 7,125 | 593 | 598 | 604 | 589 | 7,050 | -1.1 |
| Printing & Writing: Total Shipments | 22,064 | 23,394 | 1,969 | 2,014 | 1,962 | 1,924 | 23,868 | 2.0 |
| Groundwood Paper – Shipments | 1,716 | 1,609 | 148 | 161 | 147 | 148 | 1,741 | 8.3 |
| – New Orders | 1,717 | 1,655 | 164 | 169 | 123 | 149 | 1,825 | 10.3 |
| – Unshipped Orders | 220 | 164 | 222 | 229 | 201 | 206 | 206 | 25.6 |
| Coated Groundwood – Shipments | 4,040 | 4,364 | 342 | 333 | 347 | 345 | 4,290 | -1.7 |
| Coated Free Sheet – Shipments | 3,319 | 3,755 | 335 | 340 | 319 | 317 | 3,894 | 3.7 |
| Total Coated Papers – Shipments | 7,358 | 8,119 | 677 | 674 | 666 | 662 | 8,183 | 0.8 |
| – New Orders | 7,342 | 8,151 | 666 | 657 | 613 | 742 | 8,181 | 0.4 |
| – Unshipped Orders | 591 | 903 | 746 | 725 | 657 | 747 | 747 | -17.2 |
| Uncid Free Sheet – Shipments | 11,504 | 12,170 | 1,008 | 1,037 | 1,011 | 977 | 12,336 | 1.4 |
| – New Orders | 11,497 | 12,293 | 1,017 | 1,022 | 982 | 974 | 12,481 | 1.5 |
| – Unshipped Orders | 690 | 720 | 917 | 908 | 864 | 873 | 873 | 21.2 |
| Thin Papers – Shipments | 197 | 175 | 14 | 14 | 13 | 14 | 157 | -10.4 |
| Cotton Fiber Paper – Shipments | 142 | 159 | 14 | 14 | 13 | 14 | 164 | 3.2 |
| Bleached Bristols – Shipments | 1,146 | 1,163 | 107 | 114 | 112 | 111 | 1,286 | 10.6 |
| Tissue Paper – Production | 5,669 | 5,784 | 481 | 518 | 498 | 514 | 6,008 | 3.9 |
| Total Packaging & Other Paper | 4,509 | 4,713 | 389 | 398 | 388 | 372 | 4,630 | -1.8 |
| Unbl. Kraft Paper – Shipments | 2,280 | 2,380 | 186 | 187 | 187 | 180 | 2,254 | -5.3 |
| Bl. Kraft Paper – Shipments | 421 | 403 | 35 | 37 | 34 | 32 | 400 | -0.6 |
| Specialty Pkg. Paper – Production | 637 | 687 | 60 | 67 | 59 | 55 | 714 | 3.9 |
| Special Industrial Paper – Production | 1,172 | 1,244 | 108 | 108 | 109 | 107 | 1,262 | 1.5 |
| TOTAL PAPER PRODUCTION – UNADJUSTED | 39,082 | 40,973 | 3,411 | 3,540 | 3,442 | 3,387 | 41,581 | 1.5 |
| TOTAL PAPER PRODUCTION – SEAS ADJ | | | 3,422 | 3,371 | 3,425 | 3,484 | 41,517 | 1.5 |
| PAPERBOARD – PRODUCTION | | | | | | | | |
| Containerboard | 28,048 | 29,357 | 2,441 | 2,506 | 2,492 | 2,548 | 29,587 | 0.8 |
| Cont'bd For Dom Use for Fibre Boxes | 24,484 | 25,746 | 2,179 | 2,222 | 2,177 | 2,218 | 26,175 | 1.7 |
| Total Linerboard | 17,006 | 17,785 | 1,514 | 1,552 | 1,510 | 1,527 | 18,173 | 2.2 |
| Unbleached Kraft | 16,213 | 16,850 | 1,378 | 1,424 | 1,402 | 1,411 | 16,732 | -0.7 |
| Solid Bleached | 170 | 150 | 11 | 12 | 13 | 13 | 146 | -2.9 |
| Recycled | 623 | 784 | 125 | 116 | 95 | 103 | 1,296 | 65.2 |
| Corrugating Medium | 7,479 | 7,961 | 666 | 670 | 667 | 692 | 8,001 | 0.5 |
| Semichemical | 5,487 | 5,722 | 474 | 481 | 476 | 503 | 5,741 | 0.3 |
| Recycled * | 1,992 | 2,239 | 192 | 189 | 191 | 189 | 2,261 | 1.0 |
| Other Containerboard for Dom Use | 301 | 345 | 25 | 23 | 24 | 23 | 309 | -10.3 |
| Containerboard for Export | 3,263 | 3,267 | 237 | 260 | 291 | 307 | 3,103 | -5.0 |
| Boxboard | 12,369 | 12,611 | 1,106 | 1,126 | 1,107 | 1,109 | 13,214 | 4.8 |
| Boxboard for Packaging for Dom Use | 7,326 | 7,390 | 649 | 643 | 642 | 644 | 7,718 | 4.4 |
| Folding Boxboard | 5,589 | 5,651 | 497 | 500 | 487 | 485 | 5,906 | 4.5 |
| Solid Bleached | 1,938 | 1,888 | 165 | 165 | 165 | 175 | 1,978 | 4.8 |
| Unbleached Kraft | 1,124 | 1,143 | 106 | 97 | 91 | 100 | 1,197 | 4.8 |
| Recycled | 2,526 | 2,620 | 226 | 238 | 232 | 210 | 2,730 | 4.2 |
| Set-up Boxboard for Dom Use | 275 | 283 | 24 | 31 | 28 | 20 | 303 | 7.2 |
| Milk Carton & Food Service Dom Use | 1,463 | 1,457 | 127 | 112 | 127 | 139 | 1,509 | 3.6 |
| Other Boxboard for Domestic Use | 3,990 | 4,156 | 377 | 388 | 376 | 382 | 4,404 | 5.9 |
| Boxboard for Export | 1,053 | 1,063 | 80 | 95 | 89 | 103 | 1,092 | 2.7 |
| Paperboard Production by Furnish | 40,416 | 41,968 | 3,547 | 3,632 | 3,598 | 3,657 | 42,801 | 2.0 |
| Unbleached Kraft | 20,960 | 21,658 | 1,753 | 1,818 | 1,814 | 1,854 | 21,447 | -1.0 |
| Semichemical | 5,857 | 5,902 | 485 | 493 | 489 | 515 | 5,906 | 0.1 |
| Solid Bleached Kraft | 4,572 | 4,503 | 382 | 371 | 387 | 415 | 4,605 | 2.3 |
| Recycled | 9,227 | 9,906 | 926 | 950 | 909 | 873 | 10,843 | 9.5 |
| Paperboard Production for Export | 4,316 | 4329 | 317 | 356 | 380 | 410 | 4,195 | -3.1 |
| Unbleached Kraft | 3,323 | 3,320 | 245 | 273 | 298 | 320 | 3,209 | -3.3 |
| Semichemical | 170 | 180 | 11 | 12 | 13 | 12 | 165 | -8.4 |
| Bleached Kraft | 743 | 756 | 57 | 65 | 62 | 71 | 742 | -1.9 |
| Recycled | 80 | 72 | 4 | 5 | 8 | 7 | 79 | 9.3 |
| TOTAL PAPERBOARD PRODUCTION – UNADJ | 40,416 | 41,968 | 3,547 | 3,632 | 3,598 | 3,657 | 42,801 | 2.0 |
| TOTAL PAPERBOARD PROD – SEAS ADJ | | | 3,558 | 3,582 | 3,676 | 3,631 | 42,710 | 2.0 |
| PAPER AND PAPERBOARD – UNADJ | 79,499 | 82,941 | 6,958 | 7,172 | 7,041 | 7,043 | 84,382 | 1.7 |
| PAPER AND PAPERBOARD – SEAS ADJ | | | 6,979 | 6,953 | 7,101 | 7,116 | 84,227 | 1.7 |

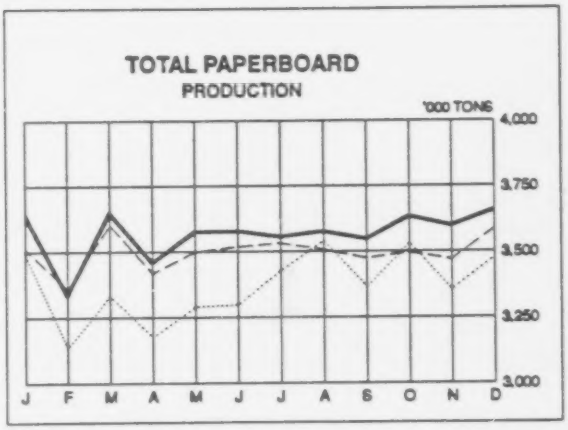
R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj. – Not Seasonally Adjusted

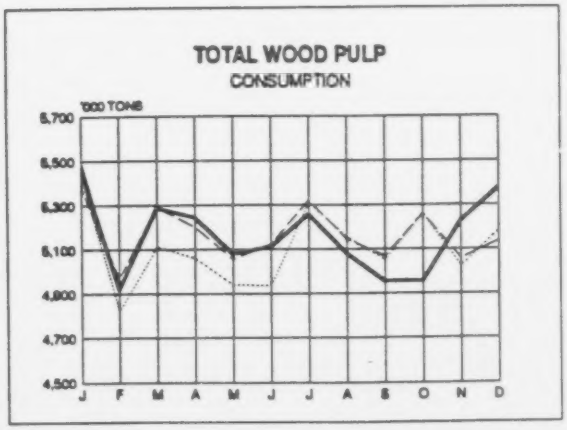
* Container Chip and Filler reclassified into Recycled Corrugating Medium

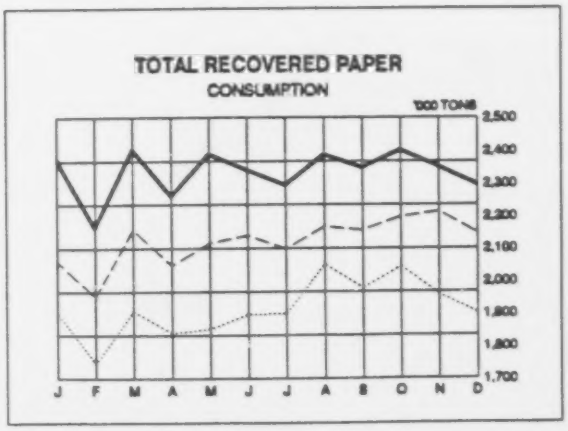


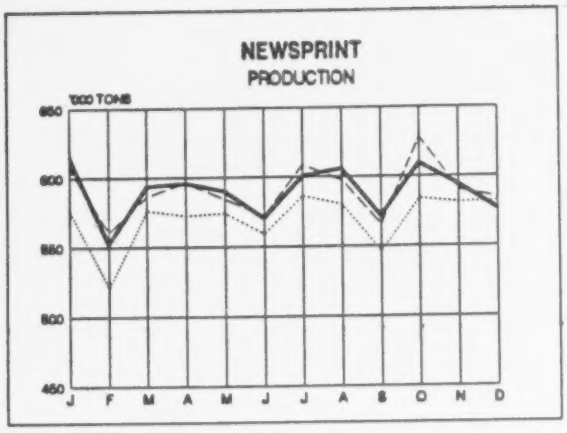

1991 ..... 1992 ----- 1993 ━━━

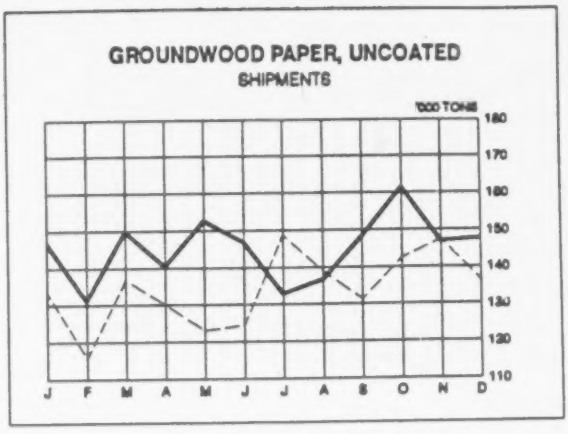
| WOOD PULP STATISTICS (Thousands of Tons) | | YEAR 1991 | YEAR 1992 | IQ 1993 | IIQ 1993 | IIIQ 1993 | IVQ 1993 | Annual Rate Y-T-D 1993 | % Change From Same Period Last Year |
|---|---|---|---|---|---|---|---|---|---|
| TOTAL WOOD PULP | | | | | | | | | |
| Total Wood Pulp (Paper Grades) | Production | 62,266 | 63,960 | 15,729 | 15,654 | 15,495 | 16,015 | 62,893 | -1.7 |
| | Imports | 4,824 | 4,882 | 1,400 | 1,274 | 1,353 | 1,297 | 5,324 | 9.0 |
| | Exports | 5,566 | 6,421 | 1,490 | 1,548 | 1,387 | 1,349 | 5,772 | -10.1 |
| | New Supply | 61,524 | 62,421 | 15,639 | 15,291 | 15,460 | 15,963 | 62,354 | -0.2 |
| Paper Grades Chemical Pulp | Production | 51,768 | 53,358 | 13,149 | 13,090 | 12,975 | 13,509 | 52,723 | -1.2 |
| | Imports | 4,504 | 4,570 | 1,280 | 1,156 | 1,258 | 1,199 | 4,892 | 7.1 |
| | Exports | 5,516 | 6,321 | 1,453 | 1,511 | 1,371 | 1,333 | 5,669 | -10.3 |
| | New Supply | 50,756 | 51,607 | 12,976 | 12,735 | 12,861 | 13,375 | 51,947 | 0.7 |
| Groundwood and Thermo-Mech. | Production | 6,404 | 6,501 | 1,576 | 1,555 | 1,515 | 1,511 | 6,157 | -5.3 |
| | Imports | 320 | 312 | 121 | 119 | 95 | 96 | 432 | 38.3 |
| | Exports | 50 | 100 | 38 | 35 | 18 | 15 | 103 | 3.3 |
| | New Supply | 6,673 | 6,713 | 1,659 | 1,639 | 1,595 | 1,593 | 6,486 | -3.4 |
| Semi-Chemical | Production | 4,094 | 4,101 | 1,005 | 1,008 | 1,005 | 995 | 4,012 | -2.2 |
| | Imports | | | | | | | | |
| | Exports | | | | | | | | |
| | New Supply | 4,094 | 4,101 | 1,005 | 1,008 | 1,005 | 995 | 4,012 | -2.2 |
| MARKET WOOD PULP | | | | | | | | | |
| Paper Grades Chemical Pulp | Production | 7,660 | 8,670 | 2,029 | 2,047 | 2,051 | 1,978 | 8,105 | -6.5 |
| | Imports | 2,816 | 2,946 | 792 | 736 | 787 | 811 | 3,126 | 6.1 |
| | Exports | 5,169 | 5,906 | 1,321 | 1,445 | 1,290 | 1,505 | 5,561 | -5.8 |
| | New Supply | 5,307 | 5,709 | 1,501 | 1,337 | 1,549 | 1,283 | 5,670 | -0.7 |

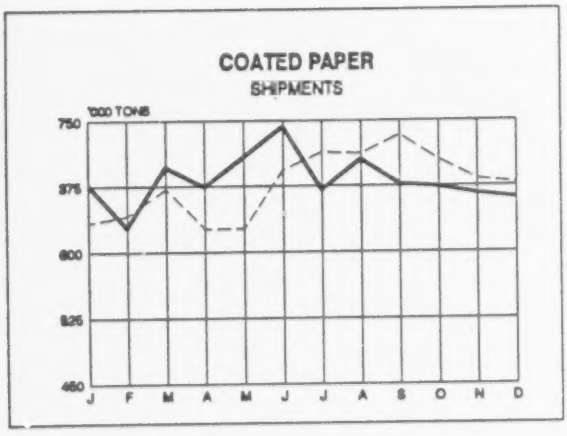
Sources: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, AFPA. Total Wood Pulp Imports & Exports - Department of Commerce.

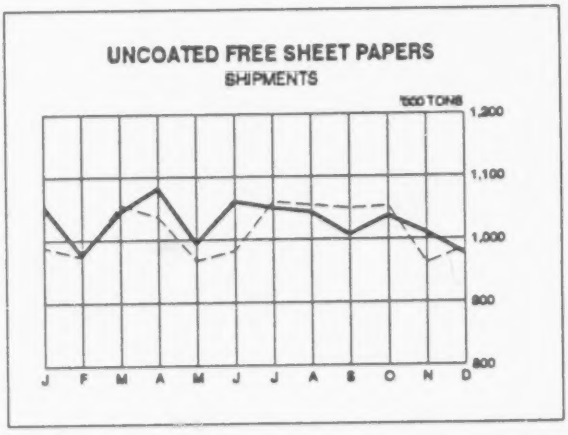
| FIBROUS RAW MATERIALS (Thousands of tons) | YEAR 1991 | YEAR 1992 | IQ 1993 | IIQ 1993 | IIIQ 1993 | IVQ 1993 | Annual Rate Y-T-D 1993 | % Change From Same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| CONSUMPTION AT PAPER & PAPERBOARD MILLS | | | | | | | | |
| Total | 84,272 | 87,451 | 22,622 | 22,420 | 22,321 | 22,986 | 90,350 | 3.3 |
| Total Wood Pulp | 61,301 | 62,011 | 15,687 | 15,433 | 15,294 | 15,942 | 62,356 | 0.6 |
| Recovered Paper | 22,971 | 25,440 | 6,936 | 6,987 | 7,027 | 7,044 | 27,994 | 10.0 |
| INVENTORIES ** | | | | | | | | |
| Chemical Paper Grade Market Pulp | | | | | | | | |
| Producers' Own-Use Inventories | 219 | 194 | 202 | 205 | 252 | 182 | 252 | 29.9 |
| Producers' Market Inventories | 518 | 882 | 872 | 789 | 839 | 756 | 839 | -4.9 |
| Consumers' Purchased Inventories * | 451 | 407 | 450 | 400 | 377 | N.A. | 377 | -7.3 |
| Recovered Paper at Paper & Bd. Mills | 1,119 | 1,152 | 1,096 | 1,103 | 1,093 | 1,053 | 1,093 | -5.1 |
| Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp ** | 23 | 41 | 41 | 38 | 32 | 39 | 39 | -4.9 |

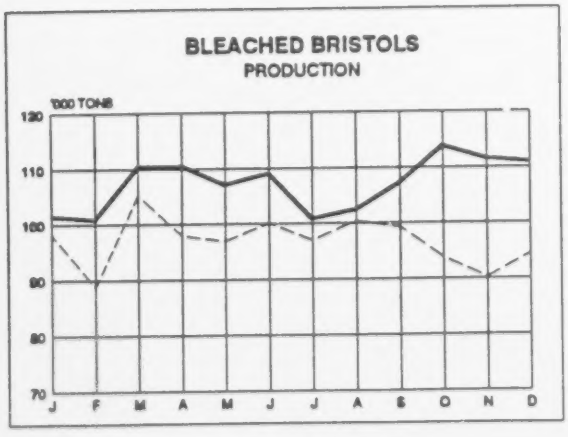
Sources: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, AFPA. N.A. - Not Available
Recovered Paper Data: Paper Recycling Committee, AFPA. * Includes all grades of wood pulp
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons. ** - End of period.

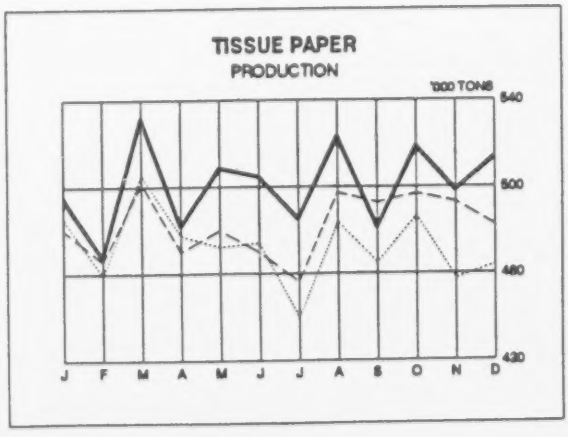



1991 ..... 1992 ——— 1993 ━━━

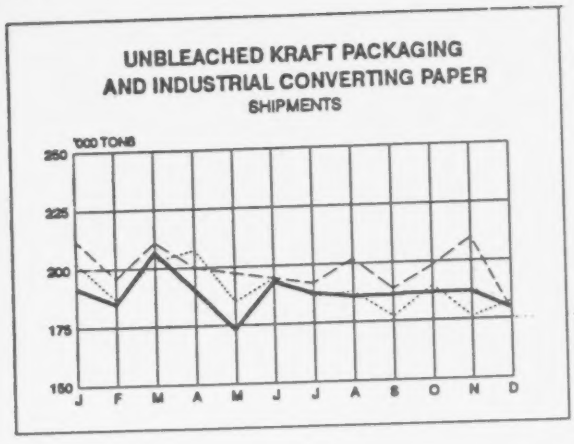
| FIBROUS RAW MATERIALS Thousands of Standard (128 Cu. ft.) Cords | YEAR 1991 | YEAR 1992 | Sep 1993 | Oct 1993 | Nov 1993 | Dec 1993 | ANNUAL RATE Y-T-D 1993 | % CHANGE FROM SAME PD LAST YEAR |
|---|---|---|---|---|---|---|---|---|
| PULPWOOD | | | | | | | | |
| Total U.S. – Total Receipts | 98,659 | 103,891 | 8,889 | 8,999 | 8,741 | 9,032 | 106,082 | 2.1 |
| – Total Consumption | 96,242 | 104,598 | 8,547 | 8,646 | 8,678 | 9,004 | 105,275 | 0.8 |
| – Residues * | 34,097 | 39,784 | 3,572 | 3,649 | 3,512 | 3,648 | 43,134 | 8.4 |
| – Inventories | 5,688 | 5,314 | 5,683 | 5,961 | 5,833 | 5,969 | 5,969 | 12.7 |
| So. Atlantic – Total Receipts | 31,286 | 33,704 | 2,869 | 2,952 | 2,899 | 2,893 | 34,958 | 3.7 |
| – Total Consumption | 31,825 | 34,015 | 2,796 | 2,839 | 2,919 | 2,896 | 34,893 | 2.0 |
| – Residues * | 10,166 | 13,173 | 1,231 | 1,277 | 1,255 | 1,249 | 14,916 | 13.2 |
| – Inventories | 1,284 | 1,199 | 1,459 | 1,514 | 1,486 | 1,503 | 1,503 | 25.4 |
| Northeast – Total Receipts | 7,333 | 7,611 | 659 | 639 | 614 | 664 | 7,791 | 3.7 |
| – Total Consumption | 6,840 | 7,341 | 647 | 610 | 631 | 658 | 7,751 | 5.8 |
| – Residues * | 1,707 | 1,800 | 148 | 131 | 140 | 150 | 1,782 | -1.0 |
| – Inventories | 423 | 347 | 333 | 354 | 326 | 330 | 330 | -4.9 |
| South Central – Total Receipts | 38,751 | 42,666 | 3,857 | 3,794 | 3,794 | 3,872 | 44,542 | 4.4 |
| – Total Consumption | 38,321 | 42,966 | 3,873 | 3,840 | 3,802 | 3,875 | 44,039 | 2.5 |
| – Residues * | 11,703 | 15,544 | 1,490 | 1,486 | 1,425 | 1,485 | 17,596 | 13.2 |
| – Inventories | 1,837 | 1,736 | 1,864 | 2,001 | 2,038 | 2,128 | 2,128 | 22.6 |
| North Central – Total Receipts | 7,207 | 7,310 | 606 | 627 | 584 | 706 | 7,419 | 1.5 |
| – Total Consumption | 7,313 | 7,339 | 568 | 637 | 630 | 654 | 7,508 | 2.3 |
| – Residues * | 1,197 | 1,139 | 88 | 94 | 87 | 145 | 1,118 | -1.8 |
| – Inventories | 925 | 813 | 741 | 729 | 654 | 721 | 721 | -11.3 |
| West – Total Receipts | 14,082 | 12,701 | 896 | 987 | 870 | 897 | 11,372 | -10.5 |
| – Total Consumption | 13,943 | 12,947 | 861 | 920 | 896 | 919 | 11,284 | -12.8 |
| – Residues * | 9,324 | 8,128 | 615 | 661 | 605 | 619 | 7,722 | -5.0 |
| – Inventories | 1,419 | 1,219 | 1,286 | 1,353 | 1,329 | 1,307 | 1,307 | 7.2 |

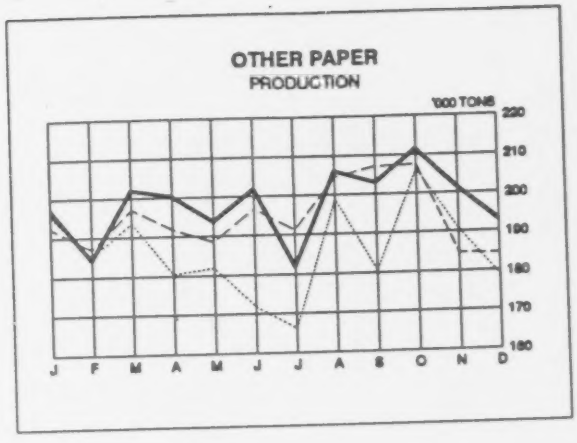
SOURCE: American Pulpwood Association * – Consumption of Residues in cords equivalent

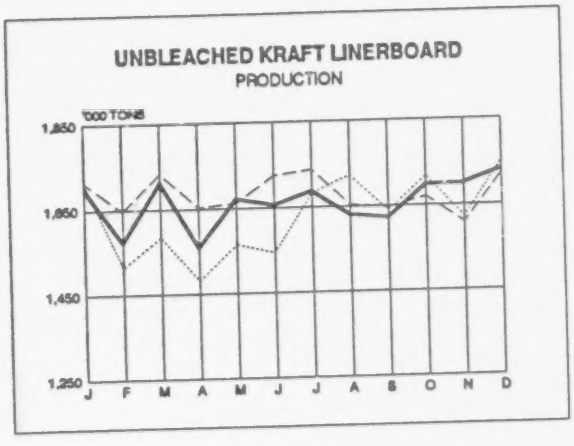
| UNITED STATES TRADE WITH CANADA | YEAR 1992 Tons | YEAR 1992 ($000) | October 1993 Tons | October 1993 ($000) | November 1993 Tons | November 1993 ($000) | ANNUAL RATE Y-T-D 1993 Tons | % CHANGE FROM SAME PD LAST YEAR |
|---|---|---|---|---|---|---|---|---|
| IMPORTS FROM CANADA | | | | | | | | |
| Pulpwood, Roundwood (in cubic meters) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0 |
| Pulpwood chips | 510,775 | 16,378 | 27,386 | 1,285 | 26,481 | 1,171 | 359,520 | -29.9 |
| Wood Pulp, Total | 4,272,013 | 1,769,418 | 375,068 | 119,472 | 375,755 | 119,911 | 4,699,664 | 8.4 |
| Waste Fibrous Materials, Total | 124,916 | 23,340 | 9,623 | 1,362 | 10,035 | 1,248 | 126,351 | 2.4 |
| Paper, Board & Products, Total | 10,842,116 | 5,977,951 | 994,652 | 514,817 | 1,001,891 | 518,969 | 11,595,058 | 7.1 |
| Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. | 10,638,898 | 5,493,008 | 970,784 | 486,078 | 978,257 | 470,172 | 11,339,624 | 6.8 |
| Paper, Paperboard & Products | 10,661,734 | 5,947,813 | 983,203 | 511,824 | 991,120 | 516,324 | 11,471,158 | 7.6 |
| Paper & Paperboard, Only | 10,619,849 | 5,462,870 | 969,336 | 463,085 | 967,496 | 467,527 | 11,216,724 | 6.8 |
| Paper, Total | 9,679,843 | 5,130,294 | 877,950 | 433,238 | 880,637 | 435,377 | 10,301,724 | 8.7 |
| Newsprint | 7,249,235 | 3,565,748 | 637,834 | 252,521 | 643,596 | 255,569 | 7,663,541 | 8.5 |
| Printing, Writing & Rel. Pap. | 2,095,858 | 1,294,773 | 213,919 | 127,821 | 208,496 | 126,531 | 2,296,852 | 8.1 |
| Pack. & Ind. Conv. Paper | 216,420 | 131,427 | 15,461 | 9,236 | 17,576 | 10,117 | 206,811 | -4.6 |
| Special Industrial Paper | 59,368 | 89,042 | 4,732 | 9,040 | 4,577 | 8,417 | 81,579 | 3.5 |
| Tissue Paper | 58,961 | 49,305 | 6,205 | 4,721 | 8,424 | 4,742 | 74,140 | 24.7 |
| Paperboard, Total | 940,006 | 332,576 | 81,386 | 29,747 | 86,859 | 32,150 | 914,000 | 8.4 |
| Convtd Paper&Paperbd Products | 203,218 | 484,943 | 23,868 | 48,739 | 23,624 | 48,797 | 255,434 | 25.1 |
| Wet Machine Board | 813 | 721 | 104 | 92 | 36 | 34 | 802 | -4.2 |
| Construction Paper & Board | 118,436 | 29,417 | 11,344 | 2,900 | 10,736 | 2,610 | 123,098 | 3.1 |

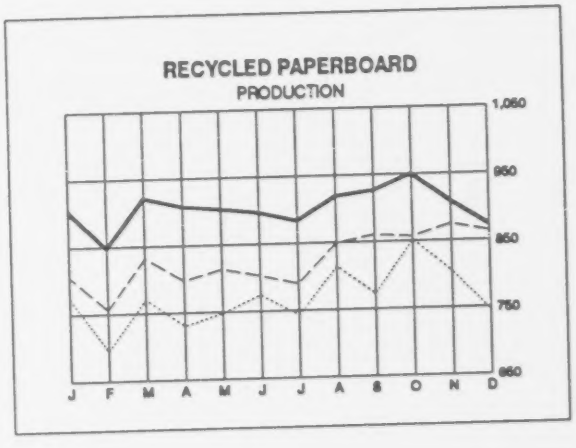
| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| EXPORTS TO CANADA | | | | | | | | |
| Pulpwood, Roundwood (in cubic meters) | 2,204,878 | 83,233 | 172,826 | 5,255 | 174,791 | 5,475 | 2,263,091 | 6.9 |
| Pulpwood chips | 364,094 | 18,539 | 30,669 | 1,431 | 47,048 | 2,323 | 349,333 | -7.9 |
| Wood Pulp, Total | 444,674 | 145,084 | 25,671 | 11,262 | 25,273 | 10,379 | 317,012 | -28.3 |
| Cotton Pulp & Other Pulp | 11,336 | 6,756 | 377 | 238 | 284 | 200 | 5,939 | -47.6 |
| Waste Paper | 796,302 | 115,834 | 100,156 | 11,900 | 96,782 | 11,609 | 1,190,884 | 51.1 |
| Paper, Board & Products, Total | 1,596,736 | 1,632,681 | 148,567 | 152,979 | 144,931 | 149,143 | 1,724,413 | 6.9 |
| Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd. | 1,154,140 | 983,462 | 106,389 | 85,036 | 104,875 | 84,839 | 1,243,953 | 6.9 |
| Paper, Paperboard & Products | 1,587,697 | 1,628,318 | 148,106 | 152,811 | 144,668 | 149,028 | 1,717,945 | 7.3 |
| Paper & Paperboard, Only | 1,032,947 | 959,099 | 105,928 | 84,869 | 104,613 | 84,722 | 1,237,485 | 7.4 |
| Paper, Total | 887,225 | 896,351 | 84,562 | 88,022 | 85,909 | 88,190 | 877,901 | -2.8 |
| Newsprint | 34,556 | 17,241 | 646 | 281 | 468 | 217 | 15,177 | -56.4 |
| Printing, Writing & Rel. Pap. | 495,673 | 490,145 | 38,485 | 38,484 | 41,038 | 40,642 | 484,845 | -3.6 |
| Pack. & Ind. Conv. Paper | 60,267 | 43,517 | 4,537 | 3,518 | 3,496 | 4,283 | 57,100 | -7.2 |
| Special Industrial Paper | 67,855 | 117,480 | 7,411 | 12,412 | 8,3[illegible] | 10,473 | 86,419 | 28.3 |
| Tissue Paper | 28,874 | 27,968 | 3,472 | 3,346 | 2,538 | 2,596 | 34,561 | 15.2 |
| Paperboard, Total | 455,877 | 282,748 | 51,376 | 26,847 | 48,704 | 26,532 | 559,584 | 22.6 |
| Convtd Paper&Paperbd Products | 444,595 | 669,219 | 42,178 | 67,943 | 40,055 | 64,304 | 480,460 | 7.0 |
| Wet Machine Board | 0 | 0 | 0 | 0 | 0 | 0 | 0 | N.M. |
| Construction Paper & Board | 11,039 | 4,363 | 461 | 167 | 262 | 117 | 6,469 | -42.1 |

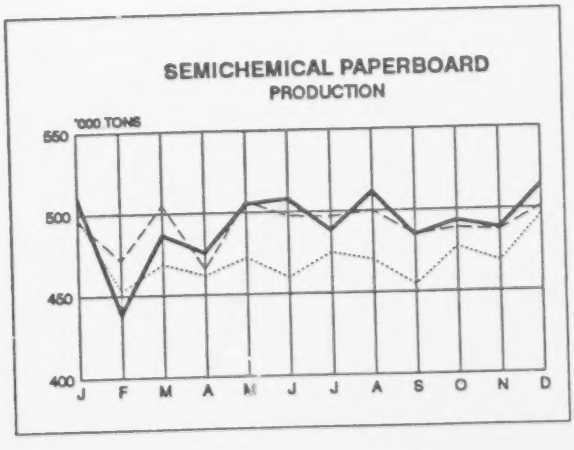
SOURCE: Bureau of Census, Department of Commerce

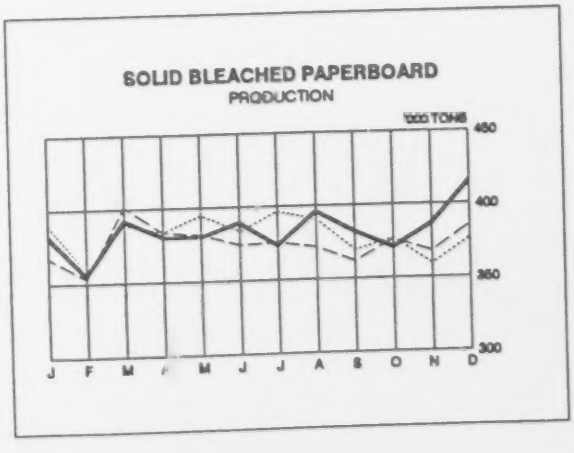



1991 ..... 1992 ----- 1993 ———

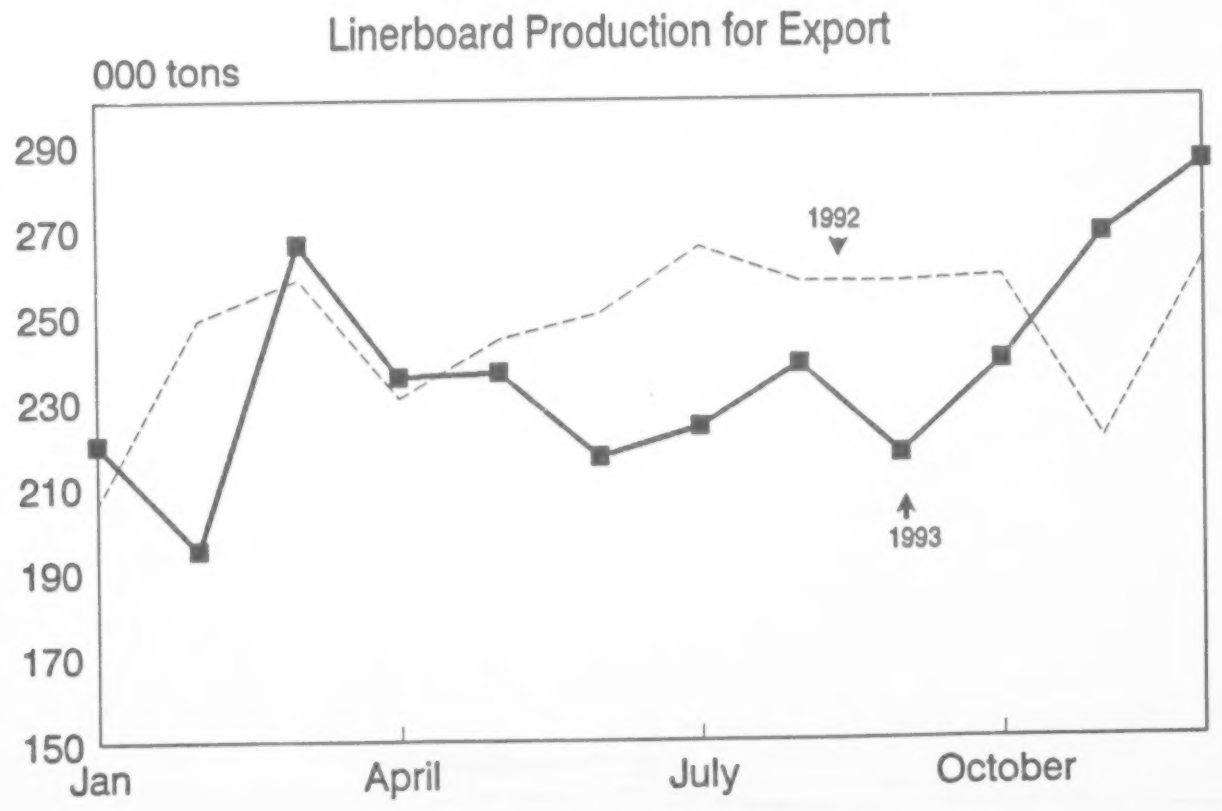
| PULP, PAPER AND PAPERBOARD IMPORTS | YEAR 1992 | | October 1993 | | November 1993 | | Annual Rate YTD 1993 Tons (1) | % Change from same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| | Tons | $000 | Tons | $000 | Tons | $000 | | |
| Pulpwood Roundwood (cubic meters) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0 |
| Pulpwood Chips | 512,961 | 16,462 | 109,309 | 2,010 | 40,563 | 1,809 | 733,877 | 42.5 |
| Total All Imports | 17,731,961 | 10,028,235 | 1,734,095 | 918,850 | 1,842,703 | 954,858 | 19,591,697 | 10.5 |
| Wood Pulp Total | 5,029,302 | 2,094,235 | 452,161 | 147,258 | 431,099 | 137,010 | 5,434,207 | 7.8 |
| Waste Paper | 149,856 | 27,668 | 10,976 | 1,709 | 10,598 | 1,419 | 136,712 | -8.9 |
| Other Fibrous Materials | 10,340 | 7,022 | 197 | 131 | 1,495 | 814 | 7,817 | -26.2 |
| Paper Board & Products Total | 12,542,963 | 7,899,310 | 1,270,761 | 789,751 | 1,199,512 | 715,814 | 14,012,962 | 11.8 |
| Paper Paperboard Wet Machine Bd. & Construction Paper & Board | 12,112,101 | 6,754,223 | 1,222,323 | 660,635 | 1,154,785 | 601,999 | 13,519,509 | 11.7 |
| Paper Ppbd & Prds ex Cnst&WMB | 12,405,877 | 7,856,513 | 1,258,029 | 765,584 | 1,187,207 | 711,811 | 13,871,101 | 11.9 |
| Paper & Paperboard Only | 11,975,314 | 6,710,426 | 1,209,561 | 646,467 | 1,142,480 | 597,996 | 13,377,648 | 11.8 |
| Paper Total | 11,031,198 | 6,296,038 | 1,112,593 | 607,909 | 1,041,432 | 557,584 | 12,304,279 | 11.8 |
| Newsprint | 7,339,583 | 3,598,986 | 652,664 | 287,307 | 649,545 | 287,942 | 7,818,825 | 7.3 |
| Printing & Writing | 3,173,198 | 2,100,089 | 419,699 | 268,813 | 351,109 | 222,257 | 3,999,981 | 24.5 |
| Uncoated Groundwood | 1,418,885 | 859,708 | 204,013 | 117,143 | 158,470 | 90,413 | 1,749,826 | 20.9 |
| Coated Print.& Impreg. Pap. | 830,054 | 808,376 | 112,393 | 83,448 | 93,316 | 66,337 | 1,140,973 | 36.9 |
| Uncoated Free Sheet | 802,147 | 500,413 | 92,531 | 57,625 | 90,244 | 56,321 | 986,370 | 22.1 |
| Thin (except Cigarette) | 11,821 | 15,303 | 852 | 902 | 189 | 513 | 7,090 | -40.0 |
| Bristols | 110,290 | 116,289 | 10,110 | 9,795 | 8,891 | 8,872 | 115,722 | 3.7 |
| Total Pkg & Other Paper | 452,286 | 541,617 | 32,234 | 45,770 | 32,774 | 41,525 | 403,299 | -12.0 |
| Unbleached Kraft Paper | 228,001 | 106,122 | 13,428 | 6,814 | 16,332 | 8,722 | 177,963 | -23.3 |
| Other Pkg. & Indust. Paper | 224,285 | 435,495 | 18,806 | 38,956 | 16,442 | 32,803 | 225,336 | -0.4 |
| Tissue | 66,130 | 55,346 | 7,996 | 6,019 | 8,004 | 5,859 | 82,174 | 22.9 |
| Paperboard, Total | 944,117 | 414,388 | 96,997 | 38,559 | 101,049 | 40,412 | 1,073,369 | 13.5 |
| Kraft Paperboard | 176,950 | 88,644 | 23,945 | 8,174 | 20,124 | 7,496 | 216,245 | 22.9 |
| Semi-Chemical Corrugating | 148,131 | 36,790 | 25,797 | 6,274 | 29,616 | 7,520 | 264,502 | 88.7 |
| Other Paperboard | 619,036 | 308,954 | 47,255 | 24,111 | 51,309 | 25,396 | 592,622 | -5.9 |
| Convtd Paper&Paperbd Products | 430,562 | 1,145,087 | 48,438 | 119,116 | 44,727 | 113,816 | 493,453 | 14.4 |
| Paper Products, Total | 304,048 | 891,733 | 35,535 | 94,170 | 32,211 | 88,991 | 353,328 | 16.8 |
| Paperboard Products, Total | 126,515 | 253,353 | 12,903 | 24,947 | 12,516 | 24,824 | 140,125 | 11.5 |
| Wet machine Board | 933 | 816 | 110 | 97 | 51 | 45 | 937 | -3.2 |
| Construction Paper & Board E | 135,853 | 42,981 | 12,623 | 4,071 | 12,254 | 3,958 | 140,924 | 3.5 |
| Notes | | | | | | | | |
| Other: No Weight Avail. ($000) | | 151,879 | | 18,472 | | 15,192 | 171,273 | 10.7 |
| Total Imports Incl. Other($000) | | 10,180,113 | | 937,321 | | 970,050 | 10,669,302 | 4.5 |

| PULP, PAPER AND PAPERBOARD EXPORTS | YEAR 1992 | | October 1993 | | November 1993 | | Annual Rate YTD 1993 Tons (1) | % Change from same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| | Tons | $000 | Tons | $000 | Tons | $000 | | |
| Pulpwood, Roundwood (cubic meters) | 2,252,713 | 63,909 | 174,518 | 5,281 | 188,442 | 6,238 | 2,339,200 | 8.1 |
| Pulpwood Chips | 5,851,111 | 474,425 | 580,670 | 43,124 | 462,352 | 39,607 | 5,229,748 | -6.4 |
| Total All Exports | 22,756,589 | 10,241,859 | 1,767,880 | 776,048 | 1,828,902 | 776,636 | 21,480,269 | -5.9 |
| Wood Pulp,Total | 7,222,258 | 3,114,419 | 445,301 | 161,107 | 558,097 | 180,930 | 6,461,692 | -10.9 |
| Cotton Pulp and Other Pulp | 115,956 | 92,001 | 12,649 | 7,316 | 11,042 | 7,012 | 127,957 | 7.8 |
| Waste and Old Paper | 6,447,655 | 643,516 | 523,499 | 44,960 | 483,721 | 40,539 | 5,865,430 | -6.4 |
| Paper, Board & Products,Total | 8,970,720 | 6,391,924 | 786,432 | 562,665 | 776,042 | 548,155 | 9,025,190 | -0.2 |
| Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board | 7,559,285 | 4,305,067 | 658,691 | 357,783 | 646,706 | 351,629 | 7,457,903 | -2.2 |
| Paper, Ppbd & Prod ex Cnst&WMB | 8,946,054 | 6,379,472 | 783,794 | 561,554 | 774,213 | 547,431 | 8,996,333 | -0.2 |
| Paper & Paperboard, Only | 7,534,619 | 4,292,615 | 656,054 | 356,671 | 644,876 | 350,906 | 7,431,046 | -2.2 |
| Paper, Total | 2,635,060 | 2,061,388 | 219,322 | 174,976 | 209,943 | 171,964 | 2,573,201 | -2.8 |
| Newsprint | 1,022,758 | 467,357 | 97,500 | 45,536 | 86,139 | 40,317 | 1,000,069 | -2.7 |
| Printing & Writing | 1,158,188 | 1,022,740 | 85,097 | 77,685 | 86,414 | 79,491 | 1,123,624 | -3.1 |
| Uncoated Groundwood | 116,020 | 82,732 | 9,133 | 6,825 | 6,023 | 5,035 | 111,518 | -5.4 |
| Clay Coated Paper | 360,797 | 304,699 | 24,932 | 21,253 | 31,014 | 24,644 | 342,517 | -5.0 |
| Uncoated Free Sheet | 448,985 | 446,094 | 33,366 | 36,212 | 32,769 | 35,890 | 425,335 | -4.8 |
| Other Printing & Writing | 232,386 | 189,215 | 17,665 | 13,595 | 16,609 | 13,921 | 244,254 | 4.0 |
| Total Pkg. & Other Paper | 381,842 | 483,062 | 30,298 | 42,740 | 32,057 | 44,642 | 381,734 | -1.3 |
| Unbleached Kraft | 141,105 | 73,814 | 10,170 | 6,587 | 11,738 | 8,007 | 130,836 | -9.3 |
| Other Pkg. & Indust. Paper | 240,736 | 409,247 | 20,128 | 37,153 | 20,319 | 36,635 | 250,898 | 3.5 |
| Tissue | 72,274 | 88,230 | 6,428 | 9,016 | 5,332 | 7,513 | 67,775 | -6.0 |
| Paperboard, Total | 4,899,559 | 2,231,227 | 436,731 | 181,696 | 434,933 | 178,941 | 4,857,845 | -1.9 |
| Solid Wood Pulp | 4,657,574 | 2,094,365 | 417,458 | 170,524 | 415,943 | 168,783 | 4,588,808 | -2.5 |
| Total Linerboard | 3,224,393 | 1,107,369 | 265,022 | 78,928 | 276,840 | 81,250 | 2,947,990 | -10.1 |
| Bleached Kraft Linerboard | 65,802 | 37,914 | 959 | 699 | 2,785 | 2,101 | 15,398 | -76.2 |
| Unbleached Kraft Linerbd | 3,158,792 | 1,069,456 | 264,063 | 78,229 | 274,055 | 79,148 | 2,932,592 | -8.8 |
| Other Unbleached Kraft | 398,633 | 211,163 | 43,288 | 18,399 | 30,511 | 15,686 | 513,678 | 29.4 |
| Other Bleached Kraft | 958,949 | 751,904 | 99,544 | 70,074 | 93,811 | 68,043 | 1,013,302 | 6.3 |
| Semi-Chemical Corrugating | 75,598 | 23,928 | 9,604 | 3,124 | 14,781 | 3,805 | 113,837 | 46.5 |
| Recycled Paperboard | 241,985 | 136,862 | 19,273 | 11,171 | 18,990 | 10,158 | 269,037 | 9.2 |
| Convtd Paper&Paperbd Products | 1,411,436 | 2,086,857 | 127,740 | 204,882 | 129,337 | 196,526 | 1,567,287 | 10.4 |
| Paper Products, Total | 638,804 | 1,347,561 | 59,749 | 132,699 | 57,896 | 125,907 | 708,434 | 10.4 |
| Paperboard Products, Total | 772,632 | 739,295 | 67,991 | 72,183 | 71,441 | 70,619 | 858,852 | 10.3 |
| Wet Machine Board | 883 | 289 | 0 | 0 | 0 | 0 | 827 | -34.9 |
| Construction Paper & Board E | 23,783 | 12,164 | 2,638 | 1,112 | 1,829 | 724 | 26,229 | 8.7 |
| Notes | | | | | | | | |
| Other: No Weight Avail. ($000) | | 77,411 | | 8,638 | | 7,902 | 87,090 | 10.8 |
| Total Exports Incl. Other($000) | | 10,319,270 | | 784,687 | | 784,538 | 9,614,759 | -7.4 |

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Incl. estim. of tonnage based on square foot data.
(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

| PRODUCER PRICE INDEXES 1982 = 100 | YEAR 1991 | YEAR 1992 | SEP 1993 | OCT 1993 | NOV 1993 | DEC 1993 | Annual Rate Y-T-D 1993 | % Change from same Period Last Year |
|---|---|---|---|---|---|---|---|---|
| Pulp, Paper and Products except Building Grades | 129.8 | 129.2 | 126.7 | 126.9 | 126.9 | 126.9 | 127.6 | -1.3 |
| Pulp Paper & Products, ex. Building Grades & ex. Waste Paper * | 129.9 | 129.4 | 126.9 | 127.2 | 127.2 | 127.2 | 127.7 | -1.3 |
| Total Wood Pulp | 119.2 | 118.9 | 102.1 | 99.6 | 98.7 | 96.5 | 104.3 | -12.3 |
| Total Paper | 127.0 | 123.2 | 124.4 | 124.1 | 123.7 | 123.4 | 123.8 | 0.5 |
| Writing Paper, exc. Newsprint | 124.8 | 120.2 | 121.8 | 121.3 | 120.5 | 120.2 | 120.5 | 0.2 |
| Newsprint | 120.9 | 110.0 | 111.0 | 110.8 | 110.7 | 110.7 | 112.0 | 1.8 |
| Total Paperboard | 130.2 | 134.3 | 127.9 | 129.6 | 130.5 | 130.5 | 130.0 | -3.2 |
| Total Paper and Paperboard * | 128.0 | 126.7 | 125.5 | 125.8 | 125.8 | 125.8 | 125.7 | -0.7 |
| Converted Products | 134.8 | 134.8 | 132.5 | 132.9 | 133.1 | 133.3 | 133.7 | -0.8 |
| Waste Paper | 121.3 | 117.4 | 112.6 | 112.1 | 107.4 | 108.4 | 118.0 | 0.5 |
| All Commodities | 116.5 | 117.2 | 118.7 | 119.1 | 118.9 | 118.4 | 118.9 | 1.5 |
| Industrial Commodities | 116.5 | 117.4 | 118.8 | 119.4 | 118.8 | 117.9 | 119.0 | 1.3 |

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by AFPA



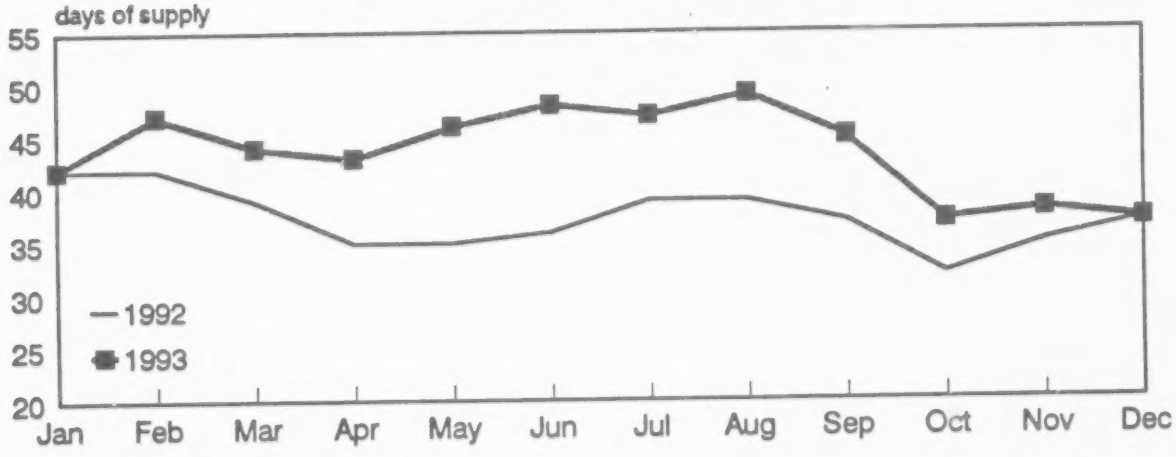
Total shipments of newsprint to the U.S. from domestic and foreign sources edged up 0.7% in 1993 to 12.9 million tons, following a 2.0% advance in 1992. Last year's sluggishness probably reflected intergrade competition as well as a lagging performance on the part of newspaper advertising activity. According to McCann-Erickson, newspaper advertising revenues rose 3.6% last year, as compared with an overall gain in media advertising revenues of 5.2%.

U.S. newsprint shipments declined 1.1% in 1993, following a 5.0% increase in 1992. The U.S. share of total newsprint shipments to the domestic market consequently ebbed from 49.0% in 1992 to 47.9% last year.

Inventories of newsprint in transit and in the hands of consumers have contracted from 49 days of supply at the end of August to 37 days of supply at the end of December. (See graph.)

End of Month Newsprint Inventories

Stocks in Transit and in the Hands of Consumers

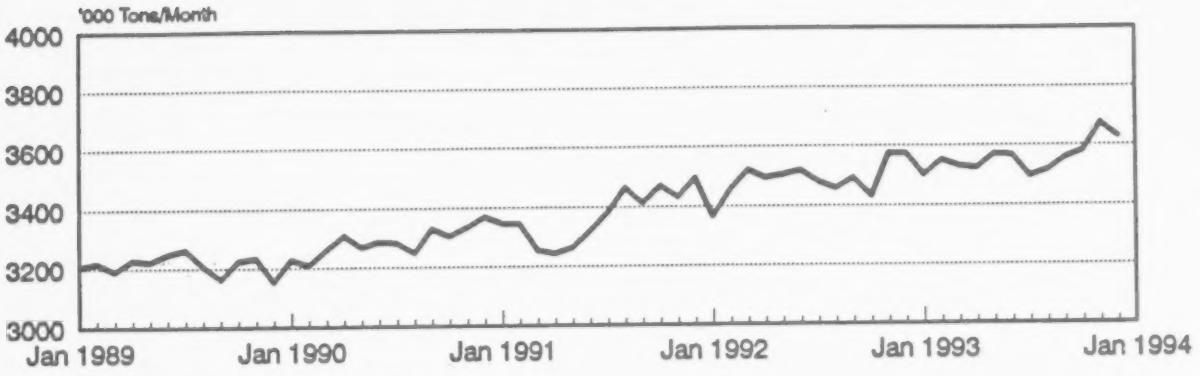



Source: AF&PA Newsprint Division

Last year brought additional declines in kraft paper demand. In particular, shipments of unbleached kraft papers contracted 5.3% in 1993, with the two major subgrades both recording lower volumes. The sharp setback in grocer's bag and sack paper shipments appears to have reflected inter-material competition along with stepped up packaging conservation efforts. Shipments of bleached kraft papers declined a comparatively modest 0.6%.

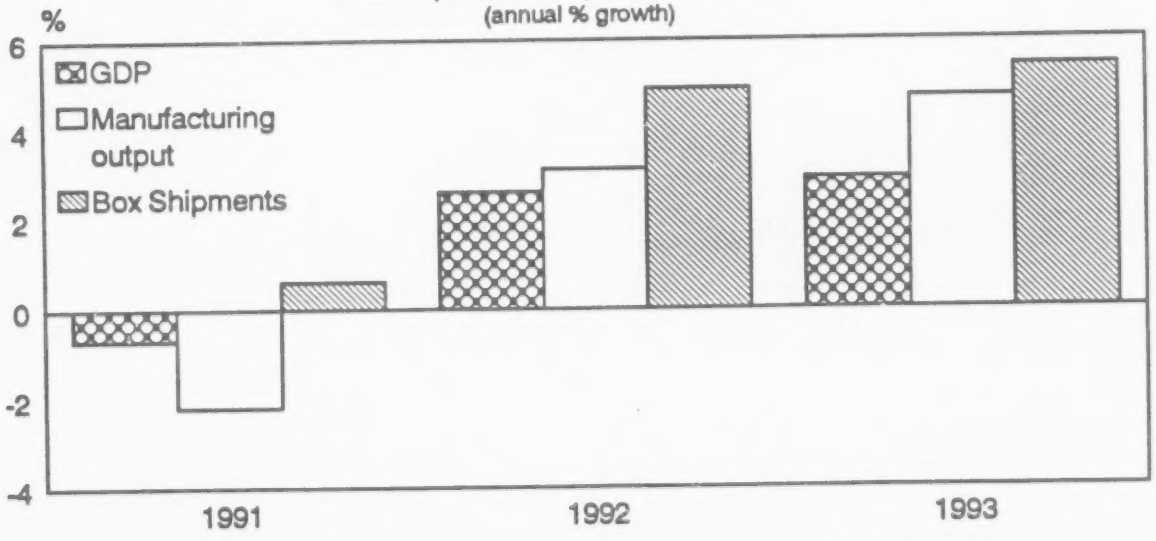
Paperboard: Despite some easing in December, fourth quarter seasonally-adjusted paperboard production reached a record-high 43.6 million tons (annual rate), up 2.9% from its fourth quarter 1992 level. Paperboard's full-year gain came in at 2.0%, although this figure was impacted by significant inventory liquidation in the containerboard sector and therefore understates underlying demand growth.

PAPERBOARD PRODUCTION
seasonally adjusted




Box shipments rose an ultra-brisk 5.4% last year, according to the Fibre Box Association, marking their strongest performance since 1986. As is depicted by the following chart, box shipments have significantly outperformed the U.S. economy during the past three years. They edged up 0.6% in 1991, even through both GDP and manufacturing output contracted that year. They advanced 4.9% in 1992, as compared with a 2.6% gain in GDP and a 3.1% increase in manufacturing output. Last year's 5.4% increase in box shipments eclipsed a 2.9% increase in GDP and a 4.7% gain in manufacturing output.

Box Shipments Outperform Economy
(annual % growth)




Seasonally-adjusted box shipments gained momentum during the course of 1993, climbing from an annual rate of 344.8 billion square feet in the first three months of the year to 368.4 billion square feet in the fourth quarter. Fourth quarter 1993 box shipments exceeded their year-end level by 9.1%.

U.S. containerboard production recorded a below-trend 0.8% increase in 1993, but exhibited improved strength towards the end of the year; for instance, fourth quarter 1993 production exceeded its year-ago level by nearly 2.0%.

Containerboard production was negatively affected by both inventory drawdowns and weak exports in 1993. Roll stock inventories at box plants and mills contracted by some 14.5% or 423,000 tons during 1993; the liquidation extended into the fourth quarter.

Total containerboard exports, most of which is unbleached kraft linerboard, declined 5.0% in 1993. However, linerboard production for export (see graph on the bottom of page 10) rose steadily in the last three months of 1993, and exceeded its year-ago level by 14.5% in the November-December period.

Less affected by weak exports and inventory drawdowns, boxboard production increased 4.8% in 1993 and exceeded its year-ago level by 6% in the fourth quarter. Boxboard's strength was distributed across the grade structure.

Production of folding boxboard for domestic use rose 4.5% in 1993, a gain that was in line with total manufacturing output, but far stronger than the 1.6% increase posted by production of nondurable goods. Increases in folding boxboard output by furnish were fairly uniform, with production of recycled folding boxboard production for domestic use up 4.2% and production of both unbleached kraft and solid bleached kraft folding boxboard up 4.8%.

Milk carton and food service production for domestic use rose 3.6% last year. That compares long-term trend growth -- 1987-92 -- of 0.5% a year. Production of milk carton and food service stock for export eased 3.3% last year, as compared with a 1% gain in 1992.

Production of other recycled boxboard advanced 6.9% in 1993, with most of the strength coming from the gypsum wallboard category, which benefited from last year's upturn in residential construction activity.

## MARKET WOOD PULP

U.S. shipments of chemical paper grade market wood pulp edged up nearly 1% in 1993 to 8.4 million short tons. The advance was rooted in a strong gain in U.S. shipments to the domestic market and a largely offsetting decline in exports. In particular, shipments of chemical paper grade market pulp to the domestic market surged 17.4% last year to 2.8 million tons.

On the other hand, exports, which accounted for about 70% of total demand for U.S. chemical grade market pulp in 1992, declined 358,000 tons (5.8%) in 1993 to 5.6 million tons. A 500,00 ton decline in exports to Western Europe more than accounted for the overall contraction. U.S. shipments of chemical paper grade market pulp to Japan also lost ground in 1993, while exports to Latin America registered a solid advance.

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MONTHLY STATISTICAL SUMMARY INSERT
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PRODUCTION

| (000 TONS) | (P) DEC 1993 | (R) NOV 1993 | DEC 1992 | FIRST TWELVE MONTHS 1993 | FIRST TWELVE MONTHS 1992 | % CHANGE YR TO DATE 1993/1992 |
|---|---|---|---|---|---|---|
| PAPER GRADES | | | | | | |
| Newsprint | 577 | 594 | 584 | 7,076 | 7,082 | -0.1 |
| Printing & Writing | 1,924 | 1,962 | 1,923 | 23,868 | 23,394 | 2.0 |
| Uncoated Groundwood (s) | 148 | 147 | 136 | 1,741 | 1,609 | 8.3 |
| Coated Groundwood (s) | 345 | 347 | 377 | 4,290 | 4,364 | -1.7 |
| Coated Free Sheet (s) | 317 | 319 | 302 | 3,894 | 3,755 | 3.7 |
| Total Coated Paper (s) | 662 | 666 | 679 | 8,183 | 8,119 | 0.8 |
| Uncoated Free Sheet Paper (s) | 977 | 1,011 | 986 | 12,336 | 12,170 | 1.4 |
| Thin Paper (s) | 14 | 13 | 15 | 157 | 175 | -10.4 |
| Cotton Fiber Paper (s) | 14 | 13 | 12 | 164 | 159 | 3.2 |
| Bleached Bristols (s) | 111 | 112 | 94 | 1,286 | 1,163 | 10.6 |
| Tissue Paper | 514 | 498 | 482 | 6,008 | 5,784 | 3.9 |
| Total Pkg & Other Paper | 372 | 388 | 362 | 4,630 | 4,713 | -1.8 |
| Unbl. Kraft Paper (s) | 180 | 187 | 178 | 2,254 | 2,380 | -5.3 |
| Bl. Kraft Paper (s) | 32 | 34 | 33 | 400 | 403 | -0.6 |
| Specialty Pkg. Paper | 55 | 59 | 56 | 714 | 687 | 3.9 |
| Special Industrial Paper | 107 | 109 | 96 | 1,262 | 1,244 | 1.5 |
| TOTAL PAPER | 3,387 | 3,442 | 3,351 | 41,581 | 40,973 | 1.5 |
| PAPERBOARD GRADES | | | | | | |
| Unbleached Kraft Paperboard | 1,854 | 1,814 | 1,836 | 21,447 | 21,658 | -1.0 |
| Unbleached Kraft Linerboard * | 1,731 | 1,700 | 1,721 | 19,941 | 20,170 | -1.1 |
| Other Unbl. Kraft Paperboard | 123 | 115 | 114 | 1,506 | 1,487 | 1.3 |
| Semichemical Paperboard | 515 | 489 | 501 | 5,906 | 5,902 | 0.1 |
| Bleached Paperboard | 415 | 387 | 386 | 4,605 | 4,503 | 2.3 |
| Recycled Paperboard | 873 | 909 | 864 | 10,843 | 9,906 | 9.5 |
| TOTAL PAPERBOARD | 3,657 | 3,598 | 3,587 | 42,801 | 41,968 | 2.0 |
| TOTAL PAPER AND PAPERBOARD | 7,043 | 7,041 | 6,939 | 84,382 | 82,941 | 1.7 |

| (000 SHORT TONS) | DEC 1993 | NOV 1993 | DEC 1992 | FIRST TWELVE MONTHS 1993 | FIRST TWELVE MONTHS 1992 | % CHANGE YR TO DATE 1993/1992 |
|---|---|---|---|---|---|---|
| U.S. MARKET PULP SHIPMENTS | | | | | | |
| Total | 753 | 740 | 743 | 8,376 | 8,305 | 0.9% |
| Total Sulfate | 723 | 717 | 729 | 8,169 | 8,067 | 1.3% |
| Bleached Sulfate | 709 | 698 | 710 | 7,975 | 7,899 | 1.0% |
| Softwood | 410 | 392 | 420 | 4,778 | 4,723 | 1.2% |
| Hardwood | 299 | 306 | 290 | 3,197 | 3,176 | 0.7% |
| Unbleached | 14 | 19 | 19 | 194 | 169 | 14.8% |
| Sulfite, Bleached and Unbleached | 30 | 23 | 14 | 207 | 238 | -13.0% |
| CONSUMPTION OF FIBROUS RAW MATERIALS AT PAPER & PAPERBOARD MILLS | | | | | | |
| Wood Pulp | 5,377 | 5,226 | 5,138 | 62,356 | 62,011 | 0.6% |
| Recovered Paper | 2,294 | 2,350 | 2,145 | 27,994 | 25,440 | 10.0% |

* Includes all unbleached kraft paperboard exports

(s) - Shipments
R - Revised
P - Preliminary

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| INDUSTRY DATA February 10, 1994 | 1991 | 1992 | 1993 | 1993 R | 1993 P | Ann. Rt. ytd '93 | % Chg. 93/92 |
|---|---|---|---|---|---|---|---|
| **PAPER & PAPERBOARD — Tons (000)** | | | Oct | Nov | Dec | | |
| Total Production (AFPA) excluding | 79,499 | 82,941 | 7,172 | 7,041 | 7,043 | 84,382 | 1.7 |
| Total Seasonally Adjusted construction | | | 6,953 | 7,101 | 7,116 | 84,227 | 1.7 |
| Imports (including Products) and wet E | 12,074 | 12,406 | 1,258 | 1,187 | 1,191 | 13,906 | 12.1 |
| Exports (including Products) machine E | 8,311 | 8,948 | 784 | 774 | 772 | 9,020 | 0.8 |
| Apparent Consumption grades E | 83,261 | 86,401 | 7,427 | 7,514 | 7,535 | 89,113 | 3.3 |
| Paper Production % Tonnage Capacity | 89.3 | 91.1 | 91.4 | 91.4 | 88.9 | 91.4 | |
| Paperboard Production % Tonnage Capacity | 93.6 | 94.4 | 93.6 | 95.2 | 93.6 | 93.9 | |
| **PAPER, PAPERBOARD & PRODUCTS** | | | Oct | Nov | Dec | | |
| Imports Including Construction and E | 12,167 | 12,543 | 1,271 | 1,200 | 1,204 | 14,049 | 12.0 |
| Exports WMB Grades (excl. HPB) E | 8,331 | 8,971 | 786 | 776 | 774 | 9,047 | 0.9 |
| Market Wood Pulp Shipments – Tons (000) | 701 | 8,291 | 712 | 740 | 753 | 8,377 | 1.0 |
| Wood Pulp Imports – Tons (000) E | 409 | 4,882 | 444 | 428 | 425 | 5,324 | 9.0 |
| Wood Pulp Exports – Tons (000) E | 500 | 6,421 | 401 | 496 | 451 | 5,772 | -10.1 |
| **Raw Materials Consumption – Tons (000)** | | | | | | | |
| Wood Pulp consumption for | 56,116 | 56,873 | 5,339 | 5,226 | 5,377 | 62,356 | 9.6 |
| Recovered Paper construction & | 21,070 | 23,295 | 2,400 | 2,350 | 2,294 | 27,994 | 20.2 |
| Total WMB grades | 77,186 | 80,168 | 7,739 | 7,576 | 7,671 | 90,350 | 12.7 |
| Pulpwood Consumption Cords (000) Amer. Pulpwd. Assn. * | 98,242 | 104,598 | 8,646 | 8,678 | 9,004 | 105,275 | 0.6 |
| **Employment (000)** | | | Oct | Nov | Dec | | |
| Paper and Allied Products RS Total | 687.9 | 687.3 | 677.0 | 676.1 | 676.7 | 680.3 | -1.0 |
| Pulp, Paper and Board Mills RS Total | 244.3 | 238.8 | 230.5 | 230.3 | 230.1 | 233.5 | -2.2 |
| **Avg. Hourly Earnings of Production Workers ($)** | | | | | | | |
| Paper and Allied Products RS | 12.72 | 13.07 | 13.55 | 13.54 | 13.60 | 13.42 | 2.7 |
| Pulp, Paper Mills RS | 15.66 | 16.19 | 17.04 | 16.96 | 16.98 | 16.71 | 3.2 |
| Paperboard Mills RS | 15.71 | 16.24 | 17.00 | 17.04 | 17.16 | 16.77 | 3.3 |
| **New Plant & Equip. Expenditures, Paper & Allied Prod. (Rept. by US Dept. of Com., Ann. Rates, Bill.$)*** | 11.50 | 10.53 | IQ '93 10.60 | IIQ '93 10.27 | IIIQ '93 9.64 | 10.23 Y | -2.8 |
| **Index of Output per Man-Hour (1982=100)** | | | Oct | Nov | Dec | | |
| in Pulp, Paper: Production Workers | 105.5 | 113.2 | 117.1 | 121.0 | 121.0 | 117.0 | 3.3 |
| and Board Mills: All Employees | 105.2 | 112.9 | 117.2 | 120.8 | 120.8 | 116.7 | 3.4 |
| **Paper & Allied Products (Million $)** | | | | | | | |
| Industry Shipments (Dept. of Commerce)* | 128,757 | 131,282 | 10,691 | 10,814 | 10,759 | 129,431 | -1.4 |
| Pulp, Paper and Paperboard* | 53,660 | 53,442 | 4,295 | 4,353 | 4,286 | 52,117 | -2.5 |
| Inventories (End of Period) – Total Industry* | 13,544 | 13,387 | 13,579 | 13,520 | 13,543 | 13,543 | 1.2 |
| Pulp, Paper and Paperboard* | 5,493 | 5,535 | 5,809 | 5,802 | 5,797 | 5,797 | 4.7 |
| **Paper & Allied Products Companies (Million $)** | | | IQ '93 | IIQ '93 | IIIQ '93 | | |
| Sales (Corporations Only) | 122,969 | 127,562 | 31,865 | 33,187 | 33,181 | 130,977 | 2.7 |
| Earnings (Corporations Only) | 2,184 | 1,213 | 686 | 814 | (1,746) | (328) | -122.5 |
| Depreciation (Corporations Only) | 6,504 | 6,974 | 1,800 | 1,868 | 1,841 | 7,345 | 5.9 |
| Net Worth (Corporations Only) | 48,642 | 47,520 | 47,873 | 47,838 | 45,956 | 141,667 | -4.3 |
| **Price Indexes (Bureau of Labor Statistics) 1982=100** | | | Oct | Nov | Dec | | |
| Pulp, Paper & Products, ex. Building Grades | 118.7 | 118.5 | 126.9 | 126.9 | 126.9 | 127.6 | 7.7 |
| Wood Pulp | 108.1 | 109.6 | 99.6 | 98.7 | 98.5 | 104.3 | -4.8 |
| Waste Paper | 110.2 | 108.2 | 112.1 | 107.4 | 108.4 | 118.0 | 9.1 |
| Paper | 116.1 | 112.8 | 124.1 | 123.7 | 123.4 | 123.8 | 9.7 |
| Paperboard | 119.1 | 123.2 | 129.6 | 130.5 | 130.5 | 130.0 | 5.6 |
| **Paper Demand (Indexed: 1987=100)** | | | Oct | Nov | Dec | | |
| Total Paper Production * | 105.9 | 110.8 | 109.6 | 111.3 | 113.3 | 112.5 | 1.5 |
| Paper New Supply * | 99.6 | 102.5 | 106.4 | 106.2 | 107.5 | 106.4 | 3.9 |
| Demand Indicators – (Weighted Average) * | 101.6 | 101.0 | 101.6 | 101.9 | 101.4 | 101.3 | 0.4 |
| Production of Nondurable Goods RS * (21.2%) | 104.1 | 106.5 | 107.0 | 107.6 | 107.4 | 106.9 | 1.1 |
| Disposable Income * (23.9%) | 107.3 | 110.4 | 113.7 | 114.2 | 114.8 | 112.5 | 1.9 |
| Total Printing and Publishing RS * (54.9%) | 96.8 | 95.0 | 94.3 | 94.4 | 93.3 | 94.3 | -0.7 |
| **Paperboard Demand (Indexed: 1987=100)** | | | Oct | Nov | Dec | | |
| Total Paperboard Production * | 108.0 | 111.9 | 114.8 | 117.8 | 116.4 | 114.1 | 2.0 |
| Production for Domestic Use E | 105.4 | 109.6 | 113.0 | 115.5 | 112.9 | 112.4 | 2.6 |
| Demand Indicators – (Weighted Average) * | 104.0 | 106.5 | 109.7 | 112.0 | 112.6 | 110.2 | 3.4 |
| Production of Consumer Goods RS * (52.06%) | 102.8 | 105.2 | 106.6 | 109.6 | 109.8 | 108.0 | 2.7 |
| Production of Equipment RS * ( 5.75%) | 108.9 | 112.7 | 123.8 | 125.2 | 126.6 | 121.3 | 7.8 |
| Production of Materials RS * (32.19%) | 105.5 | 107.9 | 113.2 | 114.3 | 115.5 | 112.3 | 4.0 |
| **Market Data** | | | Oct | Nov | Dec | | |
| Newsprint Consumption (SAAR) – Tons (000) R E | 12,565 | 12,799 | 12,787 | 13,139 | 13,106 | 12,915 | 0.9 |
| Newspaper Pub. and Printing Empl. Total(000) | 459 | 451 | 452 | 454 | 454 | 452 | 0.1 |
| Magazine Advertising Pages (PIB, Inc.) | 160,224 | 170,303 | 17,177 | 17,765 | 14,903 | 168,457 | -1.1 |
| Wholesalers Sales and Inventories (Million $) | | | | | | | |
| Total Paper & Pap. Prdcts. ex Wallpaper Sales | 50,696 | 51,016 | 4,807 | 4,707 | 4,607 | 53,807 | 5.5 |
| Inventories (End of Period) | 5,044 | 5,396 | 5,597 | 5,466 | 5,726 | 5,726 | 6.1 |
| **Fibre Box Data (Fibre Box Association)** | | | Oct | Nov | Dec | | |
| Fibre Box Shipments (Million square feet) | 320,106 | 335,696 | 32,579 | 28,943 | 28,109 | 353,755 | 5.4 |
| Container'bd Inventory at Mill & Plant (000 Tons) | 2,670 | 2,918 | 2,378 | 2,391 | 2,495 | 2,495 | -14.5 |
| **Retail Trade (Billion $)** | | | | | | | |
| Total Retail Sales * | 1,865 | 1,956 | 178.5 | 179.1 | 180.6 | 2,082 | 6.4 |
| Nondurable Goods Stores Sales * | 1,212 | 1,253 | 110.0 | 109.9 | 110.2 | 1,301 | 3.8 |
| **General Economic Data** | | | Oct | Nov | Dec | | |
| Total Industrial Production (Index 1987 = 100)* | 104.1 | 106.5 | 112.1 | 113.2 | 114.0 | 111.1 | 4.2 |
| Producer Prices (All Commodities, Index: 1982=100) | 106.6 | 107.6 | 119.1 | 118.9 | 118.4 | 118.9 | 10.5 |
| Consumer Prices (All Items-Urban Con.) (1982-4=100) | 136.2 | 140.3 | 145.7 | 145.8 | 145.8 | 144.4 | 2.9 |
| **Gross Domestic Product – Annual Rate (Billion$) *** | | | IIQ '93 | IIIQ '93 | IVQ '93 | | |
| G.D.P. or Expenditure – Current $ | 5,722.9 | 6,038.5 | 6,327.6 | 6,395.9 | 6,510.8 | 6,374.0 | 5.6 |
| G.D.P. or Expenditure – 1987 $ | 4,861.4 | 4,986.3 | 5,102.1 | 5,138.0 | 5,212.1 | 5,132.6 | 2.9 |
| **Paper & Paperboard Consumption – Pounds per Capita** | 659 | 677 | | | | 694 | |

N.M. = Not Meaningful. R = Revised RS = Revised Series E = May est. by AFPA. Y = Full year 1993. * = Seas. Adj. N.A. = Not Available. SAAR = Seas. Adj., ann. rate.